

Anti-Snoring Devices Market - Global Outlook & Forecast 2022-2027

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Report description:

The global anti-snoring devices market is expected to grow at a CAGR of 7.98% during 2022-2027.

MARKET ANALYSIS

The growth of the anti-snoring devices market is attributed to key factors such as a high prevalence of snoring, OSA, increasing awareness of adverse effects of snoring, technological advancements in anti-snoring devices, and an increasingly aging population. Chronic snoring causes many people (and their partners) to lose sleep. The most common cause of snoring is when the throat and tongue tissues become overly relaxed. The sound of snoring is made when air vibrates the tissue as it passes through.

The technological advancements have affected the anti-snoring market positively. Smart anti-snoring devices are part of the innovative concept, which involves creating the functionality of devices used daily and making them perform more than intended. Connectivity options using IoT, enabling these devices to be interconnected with other devices at home, have further increased their basic functions. During the forecast period, it is expected that the oral anti-snoring devices market will continue to grow much faster than the CPAP and other devices. This is because of the high patient adherence, as these are available at dentists and online channels, making it easy for manufacturers to market their products.

MARKET TRENDS & OPPORTUNITIES

Emergence Of Smart Snoring Devices

-□ Snoring is a common problem that affects not only individuals but also their partners. Most solutions available in the anti-snoring devices market, such as mouthguards, strips, and bands, are often uncomfortable for the wearer. To address this issue, medical technology start-ups are developing non-invasive anti-snoring devices. When these devices detect the sound of snoring, they gently move the snorer's head to restore normal breathing and stop snoring.

-□ A Canadian company Smart Nora offers non-invasive anti-snoring solutions. This product consists of three parts: a Pebble device that detects snoring, a padded pillowcase, and a quiet pump that inflates and contracts the padded insert. When the initial snoring sound is detected, the pillow is moved. Movement stimulates the neck muscles, resumes natural breathing, and improves sleep

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quality. Signifier Medical Technologies offers new and innovative devices. eXciteOSA is a removable tongue muscle stimulation device that provides nerve muscle stimulation of the tongue to lower snoring and mild sleep apnea in patients over the age of 18.

New Launches and Approval of Anti-Snoring Devices

-□ Sleep apnea treatment is very effective for patients due to increasing evidence that it improves symptoms, lowers blood pressure, improves glucose control, and reduces the risk of movement disorders. Because the consequences of the disease can be irreversible, it can create a strong case that early treatment may be beneficial," says Atul Malhotra, M.D. Head of Sleep Medicine Research at the University of California, San Diego Health.

-□ In May 2022, Illusion Aligners launched a new innovative anti-snoring device in the anti-snoring devices market. This Illusion Aligner oral anti-snoring device is easy to wear, effective, and comfortable. It helps the user to experience an undisturbed and peaceful sleep every night. The FDA has granted Signifier Medical Technologies, LLC marketing approval for eXcite OSA devices. In February 2021, Signifier Medical Technologies launched an innovative anti-snoring device, eXciteOSA. The device works by producing electrical muscle stimulation through a mouthpiece that lies around the tongue. The device has four electrodes, two located above the tongue and two below the tongue. GoodSmonia will also launch a Smart stop-snoring device in the anti-snoring devices market. The product helps increase blood flow and stimulates the muscle, toning the soft palate and making them tighter and stronger.

Technological Advances in Continuous Positive Airway Pressure (CPAP) Therapy

-□ Continuous Positive Airway Pressure (CPAP) has changed significantly in the anti-snoring devices market since its inception in 1981. Devices developed decades ago were heavier, noisier, and had limited performance compared to today's slim, lightweight devices. An outstanding innovation is the Automatic Airway Pressure Device (AutoPAP). With AutoPAP, airway pressure begins with light to meet lower pressure needs. When a patient falls asleep, the device automatically adjusts to increase positive airway pressure and keep the respiratory system open. State-of-the-art CPAP and autoPAP machines include microprocessors that enable high-density data storage, internal self-tests to ensure that hardware and software are functioning properly, and patient usage specifics.

-□ It contains several reports that can detail the parameters. This allows clinicians to track patient compliance and keep track of usage in an hourly, daily, weekly, or monthly format. The important thing is to get accurate daily usage. Compliance measurements are more accurate by recording mask-on-time instead of on-time (used in older CPAP models via a digital meter).

-□ Another notable feature of CPAP today is its low noise level. In addition to size and weight, the CPAP machine's ability to deliver 20 cm H₂O filtered air to patients with a slight hump is just as fresh for doctors, patients, and bed partners. The days of sleeping next to mechanically generated hurricanes are over, thanks to a lightweight blower well insulated with CPAP machines.

SEGMENTATION ANALYSIS

INSIGHTS BY PRODUCT

The global oral anti-snoring devices market reported a significant share of around 46.33% in 2021. The segment is estimated to be higher because Oral appliances are body-fitting dental mouthpieces that help advance the position of the jaw, tongue, and soft palate to keep air passages open. When using oral instruments, a patient needs to consult a dentist to optimize the suitability and location of the instruments.

Oral appliance therapy (OAT) comes in different styles and is based on several technologies like Mandibular Advancement Devices (MADs), tongue retaining devices, Herbst-style oral appliances, and other smart OAT. The MADs used to treat sleep apnea are like the many simple snoring devices listed here in that they move the jaw forward. Thermoplastic MAD can be created and adjusted at the patient's home.

OAT is growing at a faster rate of 8.44 CAGR; the device is most preferred by the patient group in which CPAP compliance is low. With increasing CPAP device noncompliance, patients are recommended to use oral OSA devices such as mandibular advancement devices, Tongue Retaining Devices, implants, etc. The OAT is showing emerging growth in the anti-snoring devices market.

Segmentation by Product

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- Oral Devices
- Pap Devices
- Nasal Devices
- Others

Segmentation by Application

- Body Contouring & Cellulite Reduction
- Skin Tightening & Skin Lighteners
- Facial Aesthetic
- Breast Augmentation
- Others

INSIGHTS BY AGE GROUP

Among all age groups, between 40- & 59 years segments reported a major share of around 54.68% in 2021 in the global anti-snoring devices market. The segment is estimated to be higher because the 40-59 age group is the working adult population facing daily issues from the workplace to home. The major risk factors for developing OSA and its related symptoms, like snoring in this age group, are work-related stress, alcohol consumption, chronic smoking, and obesity.

According to a new study, "Mind the Workplace report" in 2022, released by Mental Health America (MHA), from more than 11,300 U.S. employees across 17 industries in 2021 showed, 71% found it difficult to concentrate at work, compared to 65% in 2020 and 46% in 2018.

The rapid shift towards being a 24/7 society that involves using the nighttime for activities contributes majorly to people's sleep cycle. This is mainly the result of rapid urbanization in developed and developing countries. Such practices induce unnecessary stress on the brain, thus making it harder to achieve ideal sleep. The increasing use of technology such as smartphones and television delay the sleeping time during the night, which also delays the waking up time. The 24/7 society is also encouraging the alternate shift approach, increasing sleeping problems in the working population.

Segmentation by Age Group

- Between 40 & 59 Years
- 60 & Above Years
- Below 40 Years

INSIGHTS BY GENDER

The men segment dominates the global anti-snoring devices market with a most significant share of around 62.01%. The segment is estimated to be higher because obesity is associated with serious health risks. Severe obesity in men further increases the risk of obesity-related complications such as coronary artery disease and end-stage renal disease. According to the 2017 CDC Report-2018, the prevalence of obesity in men was 40.3% for ages 20-39, 46.4% for ages 40-59, and 42.2% for ages 60 & older. Among men, the highest prevalence of snoring was in the 50-59-year-old group, of which 19.5% had moderate snoring, and 14.6% had habitual snoring. 10.6% of men in the 55-69-year group had clinical suspicion of obstructive snoring sleep apnea.

Segmentation by Gender

- Men
- Women

INSIGHT BY END-USER

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The sleep labs & dental clinics segment reported a significant share of around 43.07% in the global anti-snoring devices market in 2021. The segment is estimated to be higher because the sleep labs' services are in-lab testing and in-house or home sleep testing units. The diagnostic method is selected based on the disease condition and the patient's convenience. Diagnostic devices used as a part of such service differ based on the location where the diagnosis is being performed. In-lab testing includes the use of PSG or polysomnography, which is considered a gold-standard diagnostics test.

Many people are unaware that dentists can play an important role in preventing snoring. The first line of therapy against snoring is often oral therapy with a splint. The customized splint fits comfortably on teeth like a sports mouthguard. The dentist can fabricate a Mandibular Advancement Device (MAD) that slowly moves the mandible forward to a more favorable position and prevents soft tissue from blocking the airways.

Segmentation by End User

- Sleep Labs & Dental Clinics
- Home Healthcare
- Hospitals

GEOGRAPHICAL ANALYSIS

North America reported a significant share of around 33.31% among all regions in the global anti-snoring devices market. The region's market growth is favored by various factors, including the high prevalence of sleep disorders, decrease in sleep patterns, lifestyle changes, and presence of multiple vendors, including key players, start-ups, and sleep-based companies. The prevalence of OSA in North America is nearly 15 to 30% in men and 10 to 15% in women. The North American region has witnessed a high prevalence of OSA, snoring, and anti-snoring device manufacturers, which boosts the region's market share more than any other region in the world. The U.S. is the largest revenue generator country in the North American region due to lifestyle changes and the sedentary lifestyle of the country.

Asia Pacific (APAC) accounts for a 22.56% share in the global anti-snoring devices market and is estimated to reach USD 443.85% by 2027. APAC countries also witness a rapidly aging population, contributing to its increasing incidence of sleeping disorders. Mental health problems related to work stress, loneliness, and the impact of the pandemic on concentrating these issues have resulted in an increased number of cases in the region. The anti-snoring device market growth in this region is attributed to the manufacturing power of the countries involved in APAC, such as China, Japan, and India. Japan has one of the highest prevalence of mental health issues and one of the highest rates of work-related stress.

Segmentation by Geography

- North America
 - o□ U.S.
 - o□ Canada
- Europe
 - o□ Germany
 - o□ France
 - o□ UK
 - o□ Italy
 - o□ Spain
- APAC
 - o□ Japan
 - o□ China
 - o□ India
 - o□ South Korea

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- o□Australia
- Latin America
- o□Brazil
- o□Mexico
- o□Argentina
- Middle East & Africa
- o□Turkey
- o□Saudi Arabia
- o□South Africa

VENDOR LANDSCAPE

The global anti-snoring devices market is highly diversified, with several global and local players offering a diverse range of anti-snoring devices such as oral devices, PAP devices, nasal devices, and other devices. The market is consolidated with the global players accounting for high shares. Philips, ResMed, Fisher & Paykel, Apnea Sciences, and Tomed are the leading players that account for significant market shares.

The global players focus on developing innovative products and expanding their product portfolio to remain competitive in the market. They are investing extensively in R&D and product development activities to expand their product portfolio. Manufacturers such as ResMed, Koninklijke Philips N.V, SomnoMed, and ProSomnus continuously focus on product development and offer sophisticated anti-snoring devices with new technology to increase their market presence.

Key Vendors

- Apnea Science
- ResMed
- Koninklijke Philips N.V
- Fisher & Paykel
- Tomed

Other Prominent Vendors

- Illusion Aligners
- Sleep Number
- VVFLY Electronics
- Signifier Medical Technologies
- Glidewell
- Smart Nora
- ProSomnus
- SomnoMed
- REM-Fit
- Downtown Denver Sleep Solutions
- MEDITAS
- ApneaMed
- Wolfson Holdco
- Rhinomed
- DeVilbiss Healthcare
- White Dental Healthcare
- Hupnos
- Nitetronic

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- []Nyxoah
- []Oventus
- []Vivos Therapeutics
- []Somnowell
- []ZQuiet
- []RemSleep Holdings
- []Humetron
- []Nidra Care

Recent Developments

- []In May 2022, Illusion Aligners launched a new innovative anti-snoring device. This Illusion Aligner oral anti-snoring device is easy to wear, effective, and comfortable. It helps the user to experience an undisturbed and peaceful sleep every night.
- []In February 2021, Signifier Medical Technologies launched an innovative anti-snoring device, eXciteOSA, and the device works by producing electrical muscle stimulation through a mouthpiece around the tongue. The device has four electrodes, two located above the tongue and two below the tongue. The U.S. FDA approved the commercialization of a prescription-only anti-snoring device, "eXciteOSA".

KEY QUESTIONS ANSWERED

- 1.[]What is the size of the global anti-snoring devices market?
- 2.[]What is the global anti-snoring devices market growth rate?
- 3.[]What are the trends driving the global anti-snoring devices market growth?
- 4.[]Who are the key players in the global anti-snoring devices market?
- 5.[]Which regions will likely dominate the global anti-snoring devices market during the 2021-2027?

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